

# Organization Appointment, Website Set-Up, Notes and Referral Form

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Contact or meet with each Organization and then use this Form to write down (while you are on the phone or in person) the following information to set-up or edit their Website. Each Organization will have their own individual Website (as well as every member of that Organization). One form is needed for each Organization. When you are ready, login to your Representative Website and set-up or edit the new Fundraising Account using the information you collected below.

## Contact Information

Name of Organization: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ Phone: \_\_\_\_\_

Appointment Date & Time: \_\_\_\_/\_\_\_\_/\_\_\_\_ :\_\_\_\_ Website URL: \_\_\_\_\_

Facebook Page: \_\_\_\_\_ Twitter Page: \_\_\_\_\_

## Reasons for Raising Money

|                       |                      |                         |                        |
|-----------------------|----------------------|-------------------------|------------------------|
| ___ Banquets & Events | ___ Building Fund    | ___ Coffee/Refreshments | ___ Computers and Tech |
| ___ Guest Speakers    | ___ Travel & Lodging | ___ _____               | ___ _____              |
| ___ _____             | ___ _____            | ___ _____               | ___ _____              |

## Organization's Financial Information

# of Members: \_\_\_\_\_ Financial Goal: \$ \_\_\_\_\_ Start Date of Fundraiser: \_\_\_\_\_

Paypal E-mail Address: \_\_\_\_\_ Tax I.D. #: \_\_\_\_\_

## Organization Information

Contact Name: \_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_

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Contact Name: \_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Notes: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Referrals of other Organizations

Contact Name: \_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Contact Name: \_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Contact Name: \_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_